

MEMORANDUM

To: Board of Regents

From: Board Office

Subject: Register of Iowa State University Capital Improvement Business Transactions for Period of November 13, 2003, Through December 16, 2003

Date: December 4, 2003

Recommended Actions:

1. Take the following actions for the major capital projects, as defined by Board policy adopted in June 2003.
 - a. **Friley Hall Renovation** project (see pages 3 through 6);
 1. Acknowledge receipt of the University's submission of information to address the Board's capital project evaluation criteria (pages 4 through 6);
 2. Accept the Board Office recommendation that the project be subject to further Board review and consideration, in greater detail, of the necessary criteria upon completion of the master planning phase; and
 3. Approve the architectural agreement with RDG Bussard Dikis, Des Moines, Iowa, for pre-design through programming services (\$235,000).
 2. Approve the following items for the major capital projects, for which the Board previously received the capital project evaluation criteria.
 - a. **Carver Hall Renovation** project (see pages 6 and 7); approve the project description and budget (\$2,000,000).
 - b. **Pearson Hall Remodeling** project (see pages 8 and 9); approve the Phase 2 architectural agreement with Herbert Lewis Kruse Blunck, Des Moines, Iowa (\$425,500).
 3. Approve the remaining items on the Register of Capital Improvement Business Transactions for Iowa State University.
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Executive Summary:

Requested
Approvals

The following items are presented for Board approval:

Architectural agreement with RDG Bussard Dikis, Des Moines, Iowa (\$235,000) for the **Friley Hall Renovation** project which would initially develop a master plan for the complete renovation of the residence hall, including the vacated food service space, to provide a modern facility in response to students' needs for living/learning spaces (see page 3).

Project description and budget (\$2,000,000) for the **Carver Hall Renovation** project which would renovate the space to be vacated by the College of Business to provide teaching, research and support areas for the Departments of English and Mathematics, as well as space for other University functions (see page 6).

Architectural agreement with Herbert Lewis Kruse Blunck, Des Moines, Iowa (\$425,500) for Phase 2 design services for the **Pearson Hall Remodeling** project which would provide upgraded space to house a variety of University functions being relocated to Pearson Hall, and expansion space for some existing functions in the facility (see page 8).

Revised project budget (\$12,450,000) and Change Order #1 (not to exceed \$300,000) for the installation of additional lavatories as part of the **Buchanan Hall Renovation** project which would convert the residence hall for occupancy primarily by upper level undergraduate students, provide student interaction areas, and correct deferred maintenance items (see page 10).

- The schematic design and project budget were approved prior to the July 2003 implementation date of the Board's policy for major capital projects.
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Background and Analysis:

Friley Hall Renovation

<u>Project Summary</u>			
	<u>Amount</u>	<u>Date</u>	<u>Board Action</u>
Permission to Proceed		Jan. 2003	Approved
Initial Review and Consideration of Capital Project Evaluation Criteria, Subject to Further Review with Master Plan Architectural Agreement		Dec. 2003	Receive Report
(RDG Bussard Dikis, Des Moines, IA)	\$ 235,000	Dec. 2003	Requested

Background Friley Residence Hall, located in the Union Drive Neighborhood, was constructed in various phases from 1926 through 1984. (A map indicating the location of the facility is included as Attachment A.)

The 280,000 gross square foot residence hall, which was constructed to house male students only, was designed with large open spaces and little common area program space (study areas, kitchens, music rooms, meeting rooms, etc.).

The University wishes to renovate Friley Hall to add program and recreation space, remedy life safety deficiencies, and replace aging and inadequate mechanical and electrical systems.

The common spaces would be similar to the areas provided in Union Drive Suite Building 1 (Eaton Hall), which consist of study areas, conference/computer rooms, kitchenettes, etc.

Project Scope One of the first efforts of the project would be the development of a master plan for the complete renovation of the facility so that a framework can be established for a logical progression of the renovation.

Included would be a study of the food service space (26,000 square feet) vacated when the Union Drive Community Center opened in the fall of 2003. Reallocation of this space would allow for the addition of program space without the loss of student rooms.

As currently envisioned, the project would provide for the complete renovation of Friley Hall to provide a modern facility that responds to students' needs for living/learning spaces; most of the resident rooms would continue to be planned as two-person rooms with central restroom and shower facilities.

Construction would be accomplished in multiple phases over multiple years as funds are available. Board approval would be required before proceeding with each phase.

Anticipated Cost/ Funding	\$40 million, to be funded by the Department of Residence.
Design Services	<p>Expressions of interest to provide design services for the project were received from 15 firms. Four firms were selected for interviews with an institutional Architectural Selection Committee, in accordance with Board procedures for projects of \$1 million or more.</p> <p>Based on the Committee's recommendation, the University requests approval of the selection of RDG Bussard Dikis, Des Moines, Iowa, to provide design services for the project.</p> <ul style="list-style-type: none">• The firm was selected based on its demonstrated understanding of the key project issues, the quality of the project team and residence hall consultant, the firm's extensive University experience, and its rapport with the selection committee. <p>The initial agreement with RDG Bussard Dikis would provide pre-design through programming services for a fee of \$235,000, including reimbursables.</p>
Additional Information	<p>The initial review and consideration of the capital project evaluation criteria is requested at this time. The project is subject to further review of the evaluation criteria upon completion of the master planning phase.</p> <hr/>
Evaluation Criteria	<p>Since the project meets the Board's definition of a major capital project, the University has provided the following information in response to the Board's evaluation criteria.</p>
Institutional Mission/Strategic Plan	<p>The Department of Residence mission is to advance the academic mission of Iowa State University by providing quality services and promoting living/learning communities that stimulate, enhance, and extend the total learning experience. One of the strategic objectives is to provide a variety of housing types to maintain a resident environment appropriate to the needs of the university's diverse enrollment. The renovation of facilities provides the opportunity to enhance the learning environment through the provision of space designed to support programs and services that promote student achievement.</p> <p>The renovation of Friley Hall will allow the Department of Residence to create facilities to satisfy the need for traditional residence hall accommodations. The addition of two suite buildings has already provided different residence opportunities to the Union Drive Neighborhood. The combination of these more traditional facilities and the new suite style housing will provide a rich variety to meet the needs of students in this part of campus.</p>

The renovation will result in improved circulation through this very large complex, add program and recreation space within the building, remedy life safety deficiencies, and replace aging and inadequate mechanical and electrical systems. Most of the resident rooms will continue to be planned as two-person rooms with central restroom and shower facilities.

Some reallocation of internal space is possible because of the relocation of the dining rooms and support facilities from Friley Hall to the new Union Drive Community Center. This space reallocation will allow the addition of program space without loss of student rooms.

Other Alternatives Explored	The Friley Hall Renovation was a part of the original Department of Residence Master Plan of 1998. The relocation of dining from Friley Hall and development of other student room alternatives in earlier phases of the Master Plan have opened enough space in Friley to allow renovation to begin. There has always been a desire to create a balance of housing styles in each of the major residence neighborhoods and the opportunity for traditional residence halls in the Union Drive Neighborhood exists only in Friley, but the building needs a comprehensive renovation to meet the expectations of students.
Impact on Other Facilities and Square Footage	<p>Friley Hall is a very large residence hall with about 280,000 GSF and accommodations for 1,217 students. Student capacity will not change dramatically at the conclusion of the project.</p> <p>The relocation of dining to the Union Drive Community Center will allow the reallocation of approximately 25,000 NASF to meet the need for program space.</p>
Financial Resources for Construction Project	<p>Total project cost is estimated to be \$40 million. The Department of Residence will be the funding source for the entire project and use funds set aside for maintenance and improvement of system wide facilities.</p> <p>The project schedule anticipates multiple phases of \$5-6 million each to allow the majority of the building to remain operational.</p>
Financial Resources for Operations and Maintenance	Operational costs of the new facility are estimated to remain approximately the same as they are now. The maintenance costs will be reduced due to the renovation work planned for this project. Both will be funded by the Department of Residence.

- External Forces The Department of Residence is influenced by a number of federal, state, and professional mandates:
- One of the project goals is to improve the accessibility to the building to meet the requirements of the Americans with Disabilities Act by creating accessible entrances and facilitating interior circulation.
 - The addition of air conditioning to the building will address an indoor air quality concern created by inadequate moisture control and lack of ventilation.
 - Code deficiencies will be addressed.

Carver Hall Renovation

<u>Project Summary</u>			
	<u>Amount</u>	<u>Date</u>	<u>Board Action</u>
Permission to Proceed		May 2003	Approved
Initial Review and Consideration of Capital Project Evaluation Criteria		Oct. 2003	Received Report
Architectural Agreement—Pre-Design through Schematic Design Services (Architects Rudi Lee Dreyer and Associates, Ames, IA)	\$ 42,000	Oct. 2003	Approved
Project Description and Total Budget	2,000,000	Dec. 2003	Requested

Background Carver Hall is a 132,000 gross square foot facility located south of Beardshear Hall in the central campus area. (A map indicating the location of the facility is included as Attachment B).

The building currently houses the administrative functions of the College of Business, the Department of Mathematics, and general university classroom areas.

The University wishes to convert the areas to be vacated by the relocation of the College of Business to the Gerdin Building (prior to the beginning of the 2004 spring semester) for use by the Departments of English and Mathematics; the departments were identified for assignment to Carver Hall based on their space needs and functional adjacencies within the College of Liberal Arts and Sciences.

The University has also identified the following programs for assignment to the spaces to be renovated in Carver Hall:

- Department of Psychology research program in aggression and violence in society;
- Program for Women in Science and Engineering;
- Office of Precollegiate Programs for Talented and Gifted (OPPTAG);
- Ethnic Studies Program;
- Science and Society; and
- Center for Arts and Humanities.

These programs were identified for relocation to Carver Hall to address their growth needs in the most efficient and economical manner.

Project Scope The project would remodel approximately 23,000 net assignable square feet for the programs identified above and general university classroom space.

Project Budget

Construction Cost	\$ 1,520,000
Professional Fees	345,240
Movable Equipment	32,820
Relocation	30,000
Contingency	<u>71,940</u>

TOTAL	<u>\$ 2,000,000</u>
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Source of Funds:

Income from Treasurer's Temporary Investments, Building Repair Funds, and/or General University Funds	\$ 1,700,000
Capital Appropriations (Authorized for General Classrooms and Auditoriums Project)	<u>300,000</u>

TOTAL	<u>\$ 2,000,000</u>
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Pearson Hall Remodeling

Project Summary

	<u>Amount</u>	<u>Date</u>	<u>Board Action</u>
Permission to Proceed		Sept. 1998	Approved
Project Description and Total Budget	\$ 2,712,658	Sept. 1998	Approved
Architectural Agreement (Herbert Lewis Kruse Blunck, Des Moines, IA)	251,783	Jan. 1999	Approved
Revised Project Budget	2,700,000	April 2001	Approved*
Program Statement—First Floor		Oct. 2001	Approved
Revised Program Statement		June 2003	Approved
Schematic Design—First Floor		June 2003	Approved
Architectural Amendment #1	46,217		Not Required*
Architectural Amendment #2	86,679	Sept. 2003	Not Required**
Initial Review and Consideration of Capital Project Evaluation Criteria		Sept. 2003	Received Report
Expanded Project Scope (Phase 2) and Revised Project Budget	6,958,420	Sept. 2003	Approved
Architectural Agreement—Phase 2 (Herbert Lewis Kruse Blunck, Des Moines, IA)	425,500	Dec. 2003	Requested

* Approved by University in accordance with Board procedures.

** Approved by Executive Director in accordance with Board procedures.

Background

The remodeling of Pearson Hall was initiated in response to the University's goal of providing more efficient space allocation through the centralization of departmental functions which had been located throughout campus.

- Pearson Hall is located east of the Black Engineering Building and south of Marston Hall. (A map indicating the location of the facility is included as Attachment B).

The Pearson Hall Remodeling project consists of two phases:

- The Phase 1 project would upgrade 8,422 net square feet on the first floor to house functions of the Graduate College, Office of Sponsored Programs, and Compliance Administration (relocations from Beardshear Hall), upgrade first floor restrooms, corridors, lighting and finishes, and install a fire suppression system throughout the building as required by the State Fire Marshal.

- The Phase 2 project would remodel approximately 10,000 net square feet on the ground floor to provide expansion space for functions of the Department of Computer Science (relocations from Atanasoff Hall), remodel approximately 6,000 net square feet of space on the second and third floors to provide expansion space for the Departments of Theatre and Foreign Languages and Literature (currently located in Pearson Hall), and upgrade restrooms and common spaces on these levels.

Funding Building Repair and/or General University Funds, and Income from Treasurer's Temporary Investments.

Design Services The agreement with Herbert Lewis Kruse Blunck would provide pre-design through construction services for the Phase 2 project component for a fee of \$425,500, including reimbursables.

Buchanan Hall Renovation

Project Summary

	<u>Amount</u>	<u>Date</u>	<u>Board Action</u>
Agreement for Feasibility Study (Wells Woodburn O'Neil, West Des Moines, IA)	\$ 64,600	June 2000	Approved
Permission to Proceed		Dec. 2000	Approved
Project Description and Total Budget	8,050,000	April 2002	Approved
Architectural Agreement—Pre-Design Through Construction (The Durrant Group, West Des Moines, IA)	740,950	April 2002	Approved
Program Statement		June 2002	Approved
Schematic Design		June 2002	Approved
Revised Project Budget	9,230,000	June 2002	Approved
Construction Contract—Bid Package No. 1— Reject Bids		Sept. 2002	Ratified
Revised Project Budget	12,150,000	March 2003	Approved
Construction Contract Award (HPC, L.L.C.)	9,700,000	July 2003	Ratified
Revised Project Budget	12,450,000	Dec. 2003	Requested
Construction Change Order #1 (HPC, L.L.C.)	300,000	Dec. 2003	Requested

Background Buchanan Hall is a 93,739 square foot high-rise residential facility constructed in 1964 and located south of the main campus near Lincoln Way and Ash Avenue. (A map indicating the location of the building is included as Attachment C.)

A feasibility study was undertaken to recommend modifications to Buchanan Hall in response to changing student needs, to improve program space to enrich the student learning and living experience, and to provide a more attractive residential facility.

Project
Scope

The renovation project is converting Buchanan Hall for occupancy primarily by upper level undergraduate students (although it would remain available for occupancy by graduate students) in response to the need for additional suite style, on-campus undergraduate housing.

The project is constructing new space, consisting of additions at the north and south entrances, and remodeling the existing facility to provide student interaction areas consistent with the University's mission to support undergraduate living learning environments in the residence halls.

The project would relocate support areas into the building core (increasing the occupancy of the residence hall by 23 beds to 413 beds), construct new kitchenette areas, and reconstruct the bathroom areas.

The project would also construct new accessible entrance areas with the north and south additions, correct deferred maintenance items, and improve the aesthetics of the building.

- Included would be the replacement of elevators and windows, installation of new heating, cooling, sprinkler and communication systems, upgrade of mechanical and electrical systems, and repair of the exterior brick façade.

Revised Budget

The University requests approval of a revised project budget of \$12,450,000, an increase of \$300,000.

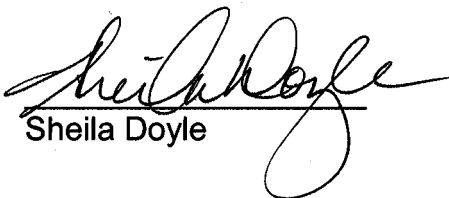
- The revised budget would add a lavatory in each double room that shares a bathroom with another double room (a total of 120 additional lavatories), and remove the lavatory from each bathroom in these living areas.
- This would provide a total of two lavatories, which would be accessible when the bathroom is occupied, to be shared by the four students in these living areas.
- The University believes the inclusion of the lavatories within the double rooms would make the rooms more desirable to students.
- The additional lavatories were bid as an add alternate to the construction contract; the University intended to include the alternate in the contract, but it was inadvertently omitted from the award recommendation.
- The budget increase would be funded by the Residence System.

Change Order Change Order #1 (not to exceed \$300,000) would incorporate into the construction contract the installation of the additional lavatories, with vanity lights and mirrors, and the associated plumbing and electrical work.

Project Budget

	<u>Revised Budget March 2003</u>	<u>Revised Budget Dec. 2003</u>
Construction Costs	\$ 10,031,570	\$ 11,421,570
Professional Fees	1,001,000	1,001,000
Movable Equipment	1,000,000	0
Contingency	<u>117,430</u>	<u>27,430</u>
 TOTAL	 <u>\$ 12,150,000</u>	 <u>\$ 12,450,000</u>
 Source of Funds		
Residence System Funds	\$ 3,540,000	\$ 3,840,000
Dormitory Revenue Bonds	<u>8,610,000</u>	<u>8,610,000</u>
	<u>\$ 12,150,000</u>	<u>\$ 12,450,000</u>

Also presented for Board ratification is one project description and budget under \$250,000, the acceptance of one completed construction contract, and four final reports. The register prepared by the University is included in the Regent Exhibit Book.


Sheila Doyle

Approved: 
Gregory S. Nichols